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ABSTRACT

Intended for use by curriculum committees or individuals charged with responsibility for the selection of provincially authorized learning resources, this document contains guidelines and procedures intended to serve as minimum standard requirements for the provincial evaluation and selection of learning resources. Learning resources are defined as those print, nonprint, and electronic software materials used by teachers or students to facilitate teaching and learning. The contents include: (1) background information; (2) a policy statement; (3) 19 guidelines which outline the responsibilities of various agencies involved and policies for classification, selection, and handling of authorized learning resources; (4) procedures for the evaluation, selection, and authorization of learning resources; (5) responsibilities of the Canadian Exchange for Instructional Materials Analyses (CEIMA); (6) responsibilities of the Computer Software Clearinghouse; (7) definition of terms used in the document; and (8) 12 appendices. The appendices include sample CEIMA forms for materials analyses; tolerance and understanding analysis, synthesis and evaluation guidelines; request for authorization or change in status of a recommended learning resource; and discard policy and procedures. (JB)

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Policy, Guidelines, and Procedures, for the Selection and Classification of Provincially Authorized Learning Resources

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Table of Contents

	Page
Foreword	i
Background	1
Policy Statement	2
Guidelines	2
Procedures	7
Stage One: First Cut Assessment	7
Stage Two: Instructional Design Analysis	8
Stage Three: Tolerance and Understanding Analysis	10
Stage Four: Curriculum Fit/Fit to Tolerance and Understanding Guidelines	10
Stage Five: Pilot Testing	11
Stage Six: Learning Resource Recommendation/Authorization	12
CEIMA/Tolerance and Understanding Administration	15
Computer Software Administration	16
Definitions	18

Appendices:

App. (i) - CEIMA Standard Print Analysis Form

App. (ii) - CEIMA Standard Print Synthesis Form

App. (iii) - CEIMA Standard Limited Content Analysis Guide and Form

App. (iv) - Tolerance and Understanding Guidelines

App. (v) - Tolerance and Understanding Standard Analysis Form

App. (vi) - Tolerance and Understanding Synthesis/Validation Form

App. (vii) - Tolerance and Understanding Evaluation/Rating Form

App. (viii) - Request for Authorization of Basic Learning Resources (Standard Form)

App. (ix) - Request for Authorization of Recommended Learning Resources (Standard Form)

App. (x) - Request for a Change in Status of a Basic Learning Resource (Standard Form)

App. (xi) - Request for a Change in Status of a Recommended Learning Resource (Standard Form)

App. (xii) - Discard Policy and Procedures (1982)

Foreword

This handbook is intended for use by those curriculum committees or individuals with responsibility for the selection of provincially authorized learning resources.

The procedures outlined have been updated and approved by Education Officials ( ). This edition supercedes and replaces all previous editions, and the procedures outlined are to be regarded as minimum, standard requirements for the provincial evaluation and selection of learning resources.

Alberta Education acknowledges with appreciation the following personnel from the Program Development Division for their assistance in updating this handbook:

Martin Adamson (Chairperson)	Media & Technology Branch
Barbara Esdale	Curriculum Branch
Garth Hendren	Curriculum Branch
David Jeffares	Early Childhood Services
Rene Mathieu	Language Services Branch
Ken McKie	Special Education Services

Background:

Learning resources play a significant role in the effective implementation of curricular programs. Some contribute to the achievement of the major goals and objectives of a program, some serve to accommodate varying student needs and learning styles, and others are intended to reinforce, enrich or extend the program.

Learning resource classification serves three important purposes:

1. It provides boards and teachers with an opportunity to select from a range of learning resources alternatives deemed appropriate to serve local needs.

2. It communicates to boards and teachers the relative importance and role of authorized learning resources.

3. It serves to identify those learning resources eligible for departmental subsidization through the School Book Branch.

The School Act, section 11, clause 2(a) (ii) provides the Minister with the power to authorize learning resources to support the courses outlined in the Programs of Study. In order to ensure that all authorized learning resources meet Alberta Education approved standards of quality, the following policy, guidelines and procedures shall be applied:

Policy:

To provide educational opportunities to learners, Alberta Education supports the selection/production and authorization of a range of learning resources which represent the best possible fit to the requirement of courses outlined in the Programs of Study and the varying needs and learning styles of the learners.

GUIDELINES:

1. The responsibility for the provincial authorization of learning resources rests with the Minister or his designate.

2. Those responsible for the selection of learning resources will ensure that all learning resources recommended for provincial authorization:

    2.1 have been subjected to all required evaluation standards and procedures.

    2.2 meet approved criteria for instructional design and curriculum fit.

    2.3 satisfy guidelines for Tolerance and Understanding.

3. Authorized learning resources will be classified into one of three categories:

    3.1 Basic learning resources.

    3.2 Recommended learning resources.

    3.3 Supplementary learning resources.

4. Wherever possible, those responsible for learning resource selection will recommend a sufficient range of Basic, Recommended and Supplementary materials to accomodate alternative points of view and differing learning styles.

5. Basic learning resources, wherever possible, shall be authorized for a minimum period of three years. Basic learning resources selected to support new or revised programs shall be authorized, wherever possible, for a period of three years from the date of mandatory implementation of the new or revised curriculum.

6. Authorized Basic learning resources may include consumable components, but only when it can be shown that such components are integral to the instructional design of the learning resource and necessary for the achievement of significant course objectives.

7. Permission is to be sought from the publisher of each authorized Basic learning resource for Alberta Education to change the format of the resource to meet the needs of the hearing and visually impaired (e.g., large print, braille, audio recording, etc.). Permission should also be sought to translate into other languages on the understanding that the publisher will retain the first right of refusal to translate and publish the required learning resource.

8. Alberta Education will assist local boards to acquire provincially authorized Basic learning resources by subsidizing the purchase price or the cost of development and/or production.

9. Descriptive information for provincially authorized learning resources will be contained in one or more of the following: Programs of Studies, Curriculum Guides, Learning Resource Listings, or other suitable means.

10. All lists of learning resources produced by or in the name of Alberta Education will contain only those titles which have been subjected to approved selection procedures and which meet approved Alberta Education standards.

11. Notwithstanding #10, above, selected bibliographies identified by reputable agencies or institutions may be included in Alberta Education service and support documents provided that:

    11.1 They are listed under the title "Other Learning Resources".

    11.2 They are identified as "Professional (or Teacher) Resources" or "Student Resources".

    11.3 The following statement is prominently displayed immediately prior to the titles listed:

    "The titles of the learning resources identified below were provided through the courtesy of (name(s) of agencies/institutions). None of these titles have been evaluated by Alberta Education and their listing is not to be construed as an explicit or implicit departmental approval for use. These titles are provided as a service only to assist local jurisdictions to identify potentially useful learning resources. The responsibility to evaluate these resources prior to selection rests with the local jurisdiction".

12. Alberta Education will give priority to the selection of Basic and Recommended learning resources. The majority of Supplementary learning resources authorized by Alberta Education will be learning resources which have been found to have merit, but which fail to meet all the criteria necessary for selection as Basic or Recommended learning resources.

13. School boards should develop policy, guidelines, and procedures in keeping with those of Alberta Education to govern the identification, analysis, evaluation and approval of learning resources at the local level to complement or supplement the learning resources authorized by the Minister or to meet local pupil or program needs.

14. A review of authorized learning resources will be undertaken:

14.1 In conjunction with a revision of curriculum.

14.2 On receipt of a formal complaint about an authorized learning resource.

14.3 Upon the identification of a potentially serious problem relative to an authorized learning resource.

14.4 Where there is a need to upgrade or update present authorizations.

15. On the basis of this review, a previously authorized learning resource may be:

15.1 Reconfirmed in its present category.
- meets all criteria specified by definition.

15.2 Redesignated to a lower authorization category.
- fails to meet criteria for authorization at its present level but does meet the criteria at a lower level.

15.3 Conditionally re-approved.
- authorized for use at its present level but only if used according to specific conditions set forth by Alberta Education.
- this redesignation will typically be applied only to Basic learning resources where a change in authorization would create a serious financial hardship to local boards and where the deficiency in the present authorization can be compensated for by following the conditions for use as specified.

15.4 Withdrawn.
- the deficiencies in the material are so serious that none of the other alternatives for redesignation can be applied.

- the learning resource is out of print and is therefore no longer available for purchase. In this event, as long as the out of print material still meets the criteria for authorization, the original authorization is to be maintained to allow schools which have sufficient copies on hand to use the resource with their students and their teachers.

- Except as a result of curriculum revision and out of print publications, recommendations for the withdrawal of Basic learning resources should not be made before the minimum authorization period of three years has expired. Only in the most exceptional circumstances will such a recommendation be considered.

16. The responsibility for the authorization of learning resources is as follows:

    16.1 Basic learning resources - Deputy Minister authorization.

    16.2 Recommended learning resources - Development Branch Director authorization.

    16.3 Supplementary learning resources - Development Manager authorization.

17. For all print and audiovisual learning resources the Media and Technology Branch will administer the CEIMA (Canadian Exchange for Instructional Material Analysis) Agreement with other provincial departments of education, and will develop and administer provincial standards for instructional design analysis and analysis of Tolerance and Understanding.

18. For all electronic software materials, the Curriculum Branch Clearinghouse will administer interprovincial agreements for software information exchange and will administer provincial standards for

computer software analysis of instructional design and tolerance and understanding.

19. When Alberta Education requests submission of learning resources as a part of the curriculum development process, final manuscripts will be accepted for evaluation provided the publisher agrees to make the necessary copies available in the event the material is approved for piloting. Unsolicited manuscripts will not be accepted for evaluation.

Procedures:

I. Evaluation, Selection and Authorization of Learning Resources.

A. STAGE ONE: First-Cut Assessment.

1. On the basis of an analysis of needs, criteria will be developed by the Curriculum Coordinating Committee, Development Manager, or Clearinghouse Manager that will serve as a basis for first-cut assessment of Basic learning resources.

2. A request for submission and a copy of the first-cut criteria will be distributed by the Learning Resource Officer, Development Manager, or Clearinghouse Manager to appropriate publishers/producers.

3. At the time Basic learning resources are being requested, publishers/producers are to be advised that:

    3.1 Except under special circumstances, only complimentary or free loan copies will be eligible for evaluation.

    3.2 Where a learning resource is made up of a number of related components, all specified components must be made available for evaluation.

3.3 For textual materials approved as Basic learning resources, a total of six complimentary copies will be requested so that each Regional Office of Education and Central Library Services will have a copy.

4. The Learning Resource Officer or Development Manager will coordinate the first-cut assessment of Basic print and audiovisual learning resources submitted. Similarly, the Clearinghouse Manager will coordinate first-cut assessment of computer software learning resources. First-cut assessment may take a variety of forms and may involve more than a single review of the resource. The end result of this stage is the identification of those learning resources which appear to be worthy of more costly and detailed assessment.

5. The Learning Resources Officer, Development Manager, or Clearinghouse Manager will advise the publisher/producer of the results of first-cut assessment.

6. Learning resources rejected at any stage of the evaluation process or which are no longer needed for evaluation purposes are to be disposed of as follows:

   6.1 If provided <u>on loan</u> by the publisher/producer, return with thanks to the publisher/producer.

   6.2 If complimentary or purchased by Alberta Education, as per Discard Policy and Procedures (App. xiii).

B. <u>STAGE TWO: Instructional Design Analysis</u>.

NOTE: Stage Two and Stage Three procedures at the discretion of the L.R.O. or Development Manager may be reversed or they may be completed simultaneously by using analysts certified for both Instructional Design and Tolerance and Understanding.

1. Successful Basic learning resources from STAGE ONE are to be divided into three categories:

    1.1 Print and audiovisual learning resources with an inherent instructional design. (All materials developed with the intention of being used as a tool for teaching or learning)

    1.2 Print and audiovisual learning resources without an inherent instructional design (e.g., novels, plays, biographies, anthologies, etc., which were developed to inform or entertain but not to serve as a formal tool for instruction).

    1.3 Computer software learning resources.

2. Basic print and audiovisual learning resources with an instructional design will be analyzed according to CEIMA standards under the supervision of the Learning Resource Officer or the Development Manager. The L.R.O. or Development Manager will:

    2.1 Contract analysis to at least two certified CEIMA analysts.

    2.2 Assess the standard of quality of completed analysis reports and approve fee payments.

    2.3 Synthesize or contract out a synthesis of the analysis reports.

    2.4 Assess the quality of the synthesis report and approve fee payment.

    2.5 Submit copies of analyses and synthesis reports to Media and Technology for validation and master filing.

3. Basic print and audiovisual learning resources with no inherent instructional design (e.g., novels, plays, anthologies, biographies, etc.) will be analysed to determine:

3.1 appropriateness of the content to the goals and objectives of the curriculum.

3.2 appropriateness of the content to the maturity, ability, and interest levels of the intended students.

3.3 literary, artistic, or historical merit as assessed by reputable reviewing agencies or individuals.

3.4 copies of all analysis/review reports are to be filed with the Media and Technology Branch.

4. All computer software learning resources will be analyzed according to Alberta Education approved standards under the supervision of the Clearinghouse Manager.

C. STAGE THREE: Tolerance and Understanding Analysis.

1. Successful basic learning resources from STAGE TWO will be analyzed according to Alberta Education standards for Tolerance and Understanding. (See App. v)

2. The L.R.O., Development Manager or Clearinghouse Manager will:

2.1 Contract analysis to at least two certified Tolerance and Understanding analysts.

2.2 Assess the quality of completed analysis reports and approve fee payment.

2.3 Synthesize or Validate the analysis reports. (See App. vi)

2.4 Submit copies of analyses and summary reports to Media and Technology for the master file.

D. STAGE FOUR: Curriculum Fit/Tolerance and Understanding Evaluation.

1. Successful Basic learning resources from STAGE THREE will be evaluated for fit to the curriculum and fit to tolerance and understanding guidelines.

2. The L.R.O., Development Manager, or responsible committee will:

2.1 complete a cross match of the characteristics of each Basic learning resource with the characteristics of the curriculum.

2.2 assess the degree to which each Basic learning resources satisfies each of the criteria identified in the Guidelines for Tolerance and Understanding. (See App. vii)

2.3 identify those Basic learning resources which best fit:

2.3.1 the requirements of the curriculum.

2.3.2 tolerance and understanding criteria.

2.3.3 the needs of the students.

E. STAGE FIVE: Pilot Testing.

1. Successful Basic learning resources from STAGE FOUR, wherever possible, will be piloted under actual classroom conditions.

2. The L.R.O., Development Manager, or responsible committee will design the pilot to provide evidence with respect to:

2.1 the readability of the learning resource for its intended use and intended audience.

2.2 the type, variety and appropriateness of student activities to meet varying student needs.

2.3 clarity of content presentation, appropriateness of sequence and depth of coverage.

2.4 ease of use by students and teachers.

2.5 appropriateness of interest levels for differing student needs.

2.6 validation of fit with program goals and objectives.

2.7 validation of fit with Tolerance and Understanding criteria.

2.8 special concerns (controversial issues, suitability to student maturity levels, etc.)

F. STAGE SIX: Recommendation/Authorization.

1. On the basis of the evidence collected through all preceding analysis, evaluation, and pilot testing, the L.R.O., Development Manager, or responsible committee will submit a recommendation for learning resource authorization.

2. Recommendations for learning resource authorization will be submitted on the standard form for the category of learning resource involved and will include all specified documentation.

3. The same procedures and standards that apply to the selection of Basic learning resources shall apply to Recommended learning resources except that:

   3.1 Pilot testing may be limited to a small student sample or be replaced by an assessment of student and curriculum fit by a panel of practicing teachers in the grade level and subject area involved.

4. Procedures and standards for the selection of Supplementary learning resources will include at least:

   4.1 an assessment of content and instructional design.
   4.2 a standard tolerance and understanding analysis/ validation.
   4.3 an assessment of fit to tolerance and understanding guidelines.

5. According to the category of learning resource involved, requests for learning resource authorizations should be submitted to:

    5.1 Basic Learning Resources - Deputy Minister

    5.2 Recommended Learning Resources - Development Branch Manager.

    5.3 Supplementary Learning Resources - Development Manager.

II. Review of Previously Authorized Learning Resources.

1. Any authorized learning resource which is under review because of curriculum revision, out-of-print status, or replacement by a newly available learning resource will be re-evaluated for curriculum and student fit only. Approved procedures and standards for the category and type of learning resource involved will be applied in the review process.

2. Any authorized learning resource under review for a reported or identified deficiency shall be re-evaluated to determine the nature and extent of the problem and its implications. In addition to standard evaluation procedures for the category and type of learning resource involved, the Development Manager may implement additional strategies where these are deemed to be necessary or advantageous. (e.g., referral to experts)

3. Where the review of an authorized learning resource indicates a need to redesignate the status of that learning resource, the responsible curriculum committee or the Development Manager will submit a recommendation for redesignation including:

    3.1 a statement of the problem or need.

    3.2 the nature of the review undertaken and the findings.

    3.3 the alternatives available.

    3.4 recommended action and financial and educational implications (including the implications to the S.B.B.).

4. Recommendations for redesignation will be forwarded and approved as follows:

    4.1 Deputy Minister for Basic learning resources.

    4.2 Development Branch Director for Recommended learning resources.

    4.3 Development Manager for Supplementary learning resources.

5. When the redesignation of an authorized learning resource has been approved, a notice to this effect will be communicated by the Development Manager to all concerned school and school system personnel, Regional Offices of Education, Alberta Education Library Services and the School Book Branch. The same notice will be included in the next publication of Education Today and will include:

    5.1 the title(s) of each learning resource redesignated and the new authorization category approved.

    5.2 the reason for the redesignation.

    5.3 the title(s), if any, of each replacement learning resource approved.

    5.4 in the case of "Conditionally Re-Approved", the conditions under which the learning resource is eligible for approved use, and the time period, if any, allowed to phase out the use of the learning resource.

    5.5 for "Withdrawn" learning resources, the notice will also include the deadline established for withdrawing the resource from use, suggestions for the appropriate disposition of the resource by local authorities, and alternatives available for replacing the resource with more suitable material.

6. Upon notification of the redesignation of authorized Basic and Recommended learning resources the School Book Branch will:

6.1 continue to make available "Conditionally Re-Approved" learning resources until the approved time period expires or until existing stock is depleted, whichever occurs first.

6.2 immediately terminate sales for all learning resources "Withdrawn".

6.3 update its next published list of learning resources by coding those redesignated learning resources still approved for use and deleting from the list all learning resources "Withdrawn".

6.4 identify those authorized resources which are out of print but still eligible for use in their existing category.

III. CEIMA and Tolerance and Understanding Administration.

1. The Media and Technology Branch will:

1.1 consult with Development Managers and L.R.O.'s to monitor and assess Alberta Education standards and procedures for print and audiovisual learning resource analysis and selection.

1.2 consult with other branches in the Program Development Division to propose revisions to update or upgrade policy, guidelines, procedures and standards for the selection of provincially authorized learning resources.

1.3 cooperate with other provinces to promote national standards and a national exchange network.

1.4 maintain the master file for CEIMA and Tolerance and Understanding reports, administer report validation, coordinate report exchange among CEIMA members, and administer report distribution to Alberta schools.

1.5 in consultation with other branches, identify candidates for CEIMA and Tolerance and Understanding analysis training, conduct training workshops, and certify qualified analysts.

1.6 maintain an up-to-date master file of all certified analysts.

1.7 maintain an inventory of all standard forms related to learning resource evaluation and authorization.

1.8 represent Alberta Education at CEIMA interprovincial meetings.

IV Computer Software Administration.

1. The Computer Software Clearinghouse will:

1.1 consult with Development Managers, L.R.O.'s, and the Media and Technology Branch to monitor and assess Alberta Education standards and procedures for software analysis and selection.

1.2 consult with other branches in the Program Development Division to propose revisions to update or upgrade policy, guidelines, procedures and standards for the selection of provincially authorized learning resources.

1.3 cooperate with other provinces to promote national standards and a national exchange network.

1.4 maintain a master file for computer analysis reports, administer report validation, coordinate report exchange and administer report distribution to Alberta schools.

1.5 in consultation with other branches, identify candidates for computer software analysis training, conduct training workshops, and certify qualified analysts.

1.6 maintain an up-to-date master file of all certified computer software analysts.

1.7 maintain an inventory of all standard forms related to computer software evaluation.

1.8 represent Alberta Education at CMEC meetings.

Definitions:

1. Learning Resources - those print, nonprint, and electronic software materials used by teachers or students to facilitate teaching and learning.

2. Basic Learning Resources - those learning resources approved by Alberta Education as being the most appropriate for meeting the majority of the goals and objectives of courses, or substantial components of courses, outlined in the Provincial Programs of Studies.

3. Recommended Learning Resources - those learning resources approved by Alberta Education because they complement Basic learning resources by making an important contribution to the attainment of one or more of the major goals of courses outlined in the Provincial Programs of Studies.

4. Supplementary Learning Resources - those learning resources approved by Alberta Education because they support courses outlined in the Programs of Studies by enriching or reinforcing the learning experience.

5. Canadian Content - a learning resource will be deemed to be Canadian in Content if:

   a) it is authored/designed/produced by a Canadian
   and
   b) it is about Canada, presents a Canadian perspective, or is designed to meet Canadian needs.

   - Additional merit will be awarded if the material is also:

   c) edited by a Canadian
   d) published, produced or manufactured in Canada.

6. CEIMA - An acronym for "Canadian Exchange for Instructional Materials Analyses". CEIMA is an interprovincial organization which develops procedures, and sets quality control standards for learning resource instructional design analysis. Alberta Education is a charter member of CEIMA.

APPENDICES

App. (i)

CANADIAN EXCHANGE FOR INSTRUCTIONAL MATERIALS ANALYSIS
(CEIMA) 1984

Analyst's Name/Number: _____ Province: _____

Date: _____ 19 ___ Hours Spent Analyzing: _____

IDENTIFICATION AND BACKGROUND

A. PROGRAM TITLE (exact title, including subtitle and series designation):

_____

_____

B. AUTHOR(S) (name(s) only):

_____

_____

C. PUBLISHER/PRODUCER:

_____

_____

D. DISTRIBUTOR:

_____

_____

E. MEDIUM(A) (example: print, for textbooks and workbooks; sound filmstrips; transparencies; film loops; manipulatives):

_____

_____

F. CURRICULUM INFORMATION:

Subject Area: (specify) _____

_____

Curriculum Role: (specify) _____

_____

Intended Users: (specify) _____

_____

G. AVAILABLE IN LANGUAGES OTHER THAN ENGLISH: (specify)

_____

_____

_____

_____

_____

H. COMPONENTS, COPYRIGHT DATE AND COST (exact title of each component, with asterisk to indicate items not available for analysis, copyright date and cost if available):

1. PRODUCT COMPONENTS	COPYRIGHT DATE	COST

2. OPTIONAL SUPPORT MATERIAL COMPONENTS	COPYRIGHT DATE	COST

I. PHYSICAL DESCRIPTION OF COMPONENTS

[Briefly describe the product components giving as clear an idea as possible of size, binding (when appropriate, e.g., consumables), approximate number of pages of print materials, length of time of tapes, number of frames in filmstrips, etc.]

PART II: INSTRUCTIONAL DESIGN CONSTRUCTS

A. Intents

DEVELOPER'S RATIONALE

[Describe the developer's reasons for developing the program. If you quote, quote accurately.] specified by developer: ___; source/pages: ___; inferred by analyst: ___

You may wish to report on assumptions made about:

___ specific content
___ subject matter approach
___ societal need
___ system of management
___ approach
___ skill building
___ "affect," e.g., interest learners, improve attitudes, change moral climate
___ special learners

LEARNER GOALS

[Give examples of goal statements, or statements from which goals can be inferred. If you quote, quote accurately.] specified by developer: ___; source/pages ___; inferred by analyst: ___; left to user: ___

You should report on:

___ explicitness
___ learning domain emphasis, e.g., cognitive, affective, psychomotor
___ achievement expectation fixed variable

LEARNER OBJECTIVES

[Give examples of objectives, or statements from which objectives can be inferred. If you quote, quote accurately.] specified by developer: ___; source/pages: ___; inferred by analyst: ___; left to user ___

You should report on:

___ explicitness
___ learning domain emphasis, e.g., cognitive, affective, psychomotor
___ specificity
___ fixed, ordered by priority, variable, number of objectives is specified
___ outcomes are identified

INTENTS CONGRUENCE

[Discuss "goodness of fit" between LEARNER GOALS and LEARNER OBJECTIVES; and among DEVELOPER'S RATIONALE, LEARNER GOALS, and LEARNER OBJECTIVES.]

___ are the objectives appropriate to reach the goals
___ are the three levels of intents development consistent with each other

V Contents

ORGANIZATION

[Provide a general description of how the content is organized and presented.]	You should report on: ___ types of illustrations ___ size and style of type ___ indexes ___ glossaries

CONTENT CHARACTERISTICS

	You should report on: ___ rationale for content selection ___ special entry competencies

SCOPE: Topics Covered and Characteristics

SCOPE: Topics Covered [Indicate sources, e.g., teacher's guide, student text or workbook.]

[Give a comprehensive listing of topics and/or skills covered by each level.]

EXTENT OF THE CONTENT COVERAGE

[Describe the extent of content coverage.]

You should report on:

___ relative topic emphasis
___ comprehensiveness of topic development
___ extent of definitions and explanations
___ number and progression of extent and difficulty of examples

SEQUENCE

[Discuss the SEQUENCE of the program.]

You should report on:

___ rationale for content arrangement
___ entry into SEQUENCE for total package
___ entry within sections or units
___ routing through total package
___ routing with sections or units
___ selector of SEQUENCE
___ branching
___ recycling

SUPPORTING MATERIALS (AVAILABLE AT ADDITIONAL COST)

[Describe the characteristics of and role of supporting materials.]

CONTENTS CONGRUENCE

[Di' 's the "goodness of fit" within ORGANIZATION OF CONTENT, CHA ERISTICS, TOPICS, SCOPE, SEQUENCE, EXTENT, SUPPORTING MATERIALS.]

In terms of the stated developer's rationale for content selection, you should report on whether:

___ topics are appropriate
___ scope provided is appropriate
___ extent of coverage is adequate
___ sequence is appropriate

In addition, you should indicate whether:

___ format is clear, uncluttered
___ supporting materials are relevant
___ visuals support the content

C. Methodology

PRESENTATION

[Describe explicitness and sources of the developer's description.] specified by developer: ___; source/pages: ___; left to user: ___

Does the developer provide information about:

___ entry competencies
___ learning approach
___ learning setting
___ variety of teaching approaches

CHARACTERISTICS OF SUGGESTED TEACHING STRATEGIES

[Examine the materials and describe the characteristics of the suggested teaching strategies.]

Check the learning approach emphasis:

___ didactic
___ programmed instruction
___ discovery
___ inquiry
___ experiential
___ hands-on
___ other

INSTRUCTIONAL MODEL

[Describe the typical sequence or order of learning that is indicated by the developer: ___; inferred by the analyst: ___

CHAR[illegible]ERISTICS OF STUDENT ACTIVITIES

[Describe the characteristics of suggested learning activities and the emphasis of the majority.]

Check the following:

___ brainstorming
___ case study
___ demonstration
___ discussion
___ drill and practice
___ field trip
___ group project
___ independent study
___ interview
___ laboratory
___ oral presentation
___ panel
___ participant observation
___ peer tutoring
___ role playing
___ simulation
___ verbal quizzing
___ workbook
___ written presentation

Comment on the following:

___ explicitness
___ levels of student involvement (active/passive)
___ participants in the activities
___ decision-maker
___ time devoted to tasks

TEACHER PREPARATION

[Describe the type of TEACHER PREPARATION needed.] specified by developer: ___; source/pages: ___; inferred by analyst: ___

You should report on:

___ explicitness
___ occasions when needed (before use the first time, at beginning of year/major units, daily/weekly presentation)

TEACHER TRAINING

[Describe provisions for TEACHER TRAINING.] specified by developer: ___; source/pages: ___; inferred by analyst: ___

You should report on:

___ explicitness
___ activities
___ availability/format, e.g., workshops at publisher's/producer's or user's expense, training materials at publisher's/producer's or user's expense

METHODOLOGY CONGRUENCE

[Discuss the "goodness of fit" among PRESENTATION, CHARACTERISTICS, INSTRUCTIONAL MODEL, TEACHING STRATEGIES and LEARNING ACTIVITIES, and TEACHER PREPARATION and TEACHER TRAINING.]

Comment on the congruency of the stated methodology with the:

___ learning approach emphasis
___ learning setting (including latitude, role of teacher, role of learners, grouping arrangements, time, pacing, pacing decision-maker)
___ learning activities (explicitness, modes of presentation, participants in the activities, decision-maker and levels of learning and appropriateness, time on task

Also comment on:

___ adequacy of instructions to teachers
___ need for teacher training/ preparation

D. Means of Evaluation

MEANS OF EVALUATION

[Comment on explicitness and components.] MEANS OF EVALUATION provided by developer: ___; left to the user: ___

PURPOSES/FUNCTIONS

[Discuss the PURPOSES/FUNCTIONS of evaluation materials.]

You should report on which materials:

___ determine learner's preinstructional status
___ pretest for placement in sequence
___ diagnose specific difficulties
___ provide formative or "corrective" feedback to guide instruction
___ assess end-of-unit/chapter outcomes
___ are summative evaluations of achievement

CONTENT FOCUS OF EVALUATION

[Describe the CONTENT FOCUS OF EVALUATION.]

You should report on:

___ learning domain emphasis e.g., cognitive, affective, psychomotor
___ main topics covered

EVALUATION MEANS OR APPROACHES

[.cribe the EVALUATION MEANS OR APPROACHES.]

You should report on:

___ methods or procedures (observation of learner behavior by teacher, by learners, by others; analysis of learner work or products; written tests or exercises supplied, available separately, teacher constructed; other)
___ basis of evaluation reference (norm- or criterion-referenced, or informal)
___ users of evaluation results (teacher, learners, others for purpose of ___)
___ feedback schedule
___ answer key provision (keys provided, developer suggests plausible responses, left to user judgment)
___ management system provided
___ evidence of standardization
___ evidence of test reliability

MEANS OF EVALUATION CONGRUENCE

[Are the evaluation tools provided adequate for the identified purposes?]

You may wish to comment on the appropriateness of fit:

___ learning domain emphasis
___ main topics covered
___ methods or procedures
___ basis of evaluation reference
___ users of evaluation results
___ feedback schedule
___ answer key provision
___ standardization and reliability

PART III: OTHER CONSIDERATIONS

ACCURACY OF CONTENT

[Describe the type and extent of inaccuracies or distortions if any are noted. Include source and pages. If you quote, quote accurately.] no inaccuracies noted: ___

Among other possibilities you can classify inaccuracies as:

___ factual errors
___ omissions
___ inappropriate placement of topics
___ misleading or irrelevant diagram charts, tables
___ computational error
___ inaccurate response in answer keys
___ incomplete index, glossary or table of contents
___ general editorial slovenliness
___ misleading information
___ internal congruency

Extent of inaccuracies can be described as:

___ not discernible
___ some errors not serious enough to interfer with effective instruction
___ serious enough to interfer with instruction
___ errors render contents useless

BALANCE/BIAS OF CONTENT

[Describe the type and extent of imbalances if any are noted. Include source and pages. If you quote, quote accurately.] no instances of imbalance noted: ___. Analysts must remain alert to the distinction between explicit and implicit imbalance.

Is there an undue imbalance with regard to the following portrayals:

___ racial
___ ethnic
___ belief system
___ socioeconomic
___ regional
___ sex roles
___ age
___ philisophical
___ ethical
___ political
___ scientific
___ language
___ one sided treatment of a topic or issue

CURRENTNESS OF CONTENT

[Describe and give examples of why the content of the program is current or not. Include source and pages. If you quote, quote accurately.]

Among other possibilities, currentness considerations may be described as:

___ dated in treatment of conventional topics
___ lacks currentness in language
___ lacks currentness in physical design
___ includes most currently treated topics
___ reflects current fads
___ reflects current community concerns

PART IV: INSTRUCTIONAL DESIGN CONGRUENCE

INTERNAL CONGRUENCE

[Analyze the fit across design constructs. Does the program "hang together?" Explain why some constructs are poorly or well matched. Are the objectives likely to be achieved given the design of the materials?]

You may wish to comment on matches between:

___ Intents and Contents
___ Intents and Methodology
___ Intents and Means of Evaluation
___ Contents and Methodology
___ Contents and Means of Evaluation
___ Methodology and Means of Evaluation

EXTERNAL CONGRUENCE

Analyze the external fit. What aspects of this program might be of concern or even controversial in some communities? Identify them and the geographical areas where they might be problems. If you quote, quote accurately.

Note: Analysts will recognize that comments must necessarily be subjective based on their experience but they should identify anything which they feel might be questioned.

Language Use - Are there expressions, statements, which may be inappropriate to the grade level (i.e., swear words, graphic descriptions, religious allusions)? Does the language used expand students understandings, are the terms and concepts logically explained and organized within the text to assist learning?

Illustrations - Are there illustrations which might be considered in dubious taste within the subject area and grade level (i.e., violent death, violence, nudes or near-nudes, commercial advertisements, propaganda)? Are illustrations integral to the understanding of concepts?

Content - Are there incidents, scenes, stories, poems, etc. which focus on excessive violence or sex, implicit or explicit?

You should comment on matches between:

___ fit to intended learners
___ fit to teacher's management of subject area
___ not appropriate topics for study in the current social climate
___ fit to community
  ___ violence
  ___ sex
  ___ political
  ___ language use
___ other

PART V: READABILITY FACTORS

b_ .ENCE STRUCTURE

	Report on the following: ___ average sentence length ___ sentence types their frequency ___ subject/predicate order ___ number and kinds of pronoun references

VOCABULARY LOAD

technical ___ non-technical ___	Comment on technical and non-technical vocabulary separately - referring to the following. ___ word length (in syllables) ___ types of words ___ use of context clues ___ function of technical words in context

IDEA LOAD

	Consider the following: ___ number of ideas ___ nature of ideas ___ extent of relevant explanations ___ demonstrated usefulness of ideas ___ developmental sequencing of ideas ___ point of view

SUMMARY

What attempts have been made to suit the readability to the i. intended audience?	Consider the following: ___ independent vs. teacher-assisted study

Recommendation for further analysis: ___ yes ___ no

PART VI: PRODUCTION FACTORS

PR.. .T DEVELOPMENT

	___ recently field tested ___ learner verified and revised (where, when and with whom)

TECHNICAL CONSIDERATIONS FOR A.V. COMPONENTS

[Comment on the technical characteristics of the components and call attention to any which would enhance or detract from intended use. Are the visuals clear? Are they in color, or black and white? (You may wish to describe your aesthetic reaction to the visuals.) Are audio materials clearly narrated and easily understandable? Are audio frame-advancement signals of filmstrips audible or inaudible or both? Can the purchaser choose between records and audiocassettes? What types of hardware are necessary? Are sound filmstrips, for example, compatible with only certain kinds of equipment?]

PACKAGING

[Describe the packaging and labeling of components and comment on the program's manageability or ease of handling and storage.]

MEDIA APPROPRIATENESS

[Comment on the appropriateness of the media, e.g., visuals, and the extent to which these elements support the content (and learning activities) of the text or narration to which they are related.]

ANALYST'S COMMENTS (OPTIONAL)

[Present your general critique of the program. Give bases for judgements where feasible, and illustrate. Include recommendations regarding further review of content for bias/fit to curriculum and readability factors.]

You may wish to comment on positive and negative aspects of the materials:

___ unique features
___ comparable to other programs
___ possible limitations in terms of intended users and settings
___ external constraints
___ possible problems in implementation and acceptance
___ teachability of the materials
___ cost factors

CEIMA SYNTHESIS FORMAT

I IDENTIFICATION AND BACKGROUND

TITLE:

AUTHOR(S)

PUBLISHER:

DISTRIBUTOR: (If different from publisher)

COPYRIGHT: (Provide latest copyright date)

MEDIA:

COMPONENTS: (Indicate copyright of each item if different from above; authors, if different for each component, cost of each item, if sold separately; and items not analyzed)

PHYSICAL DESCRIPTION: (Use metric measurements)

CURRICULUM INFORMATION: (Subject, curriculum role and intended users as designated by developer and as identified by Alberta Education)

LANGUAGES:

PRODUCT DEVELOPMENT: (See p. 15 of analyses)

II FIRST INSTRUCTIONAL DESIGN CONSTRUCT: INTENTS

DEVELOPER'S RATIONALE:

LEARNER GOALS: (Must be written in learner terms)

LEARNER OBJECTIVES: (Must be written in learner terms)

III SECOND INSTRUCTIONAL DESIGN CONSTRUCT: CONTENTS

SCOPE: (Include topics and/or skills covered, idea load, relative topic emphasis, and major chapters/sections; if listing major chapters/sections, indicate the number of pages in each chapter/section; describe how the content is graphically presented; indicate the presence or absence of supporting materials and their relevance to the program)

SEQUENCE: (A statement of how the content is sequenced, entry and routing through the program or sections, opportunities for branching and recycling, the significance of the organization to the content or methodology, etc.)

IV THIRD INSTRUCTIONAL DESIGN CONSTRUCT: METHODOLOGY

(No subheadings in this section. Include a description of entry competencies, learning approach and setting, teaching strategies, major learning activities. Teacher Preparation/Training are not included in this section of the synthesis - see section VI)

V FOURTH INSTRUCTIONAL DESIGN CONSTRUCT: MEANS OF EVALUATION
(No subheadings in this section. Describe evaluation means provided or suggested by developer: purpose, content focus, methods or procedures, feedback, answer key provision, etc.)

VI CONGRUENCE AND SUMMARY

No subheadings but this section should summarize the major features of the program:

1. A paragraph on internal congruency

2. A Content summary

3. A summary statement about methodology and evaluation, relating these to the strengths and weaknesses of the program.

4. An evaluative assessment of the program indicating the major strengths and weaknesses.

5. A statement indicating relationship to the Alberta curriculum and identifying the reading level and the instruments used to determine it.

6. Examine all statements on congruence found throughout the analyses as well as analysts' comments (p.17) and note significant information.

7. Add any additional significant information detected while examining the materials.

VI OTHER CONSIDERATIONS

TECHNICAL CONSIDERATIONS/PACKAGING/MEDIA APPROPRIATENESS: (Note clarity of visuals/print, relationship of visuals to content and learning activities, technical quality of audiovisual components - see p.15 of analyses)

TEACHER TRAINING AND PREPARATION:

COMMUNITY CONCERNS/BIAS/ACCURACY/CURRENCY: (see p. 14,16,17 of analyses)

App. (iii)

CEIMA FORM M (MODIFIED) ANALYSIS GUIDE FOR LIMITED CONTENT INSTRUCTIONAL MATERIALS

I. INTRODUCTION

CEIMA Analysis is not evaluation. The analyst must put aside his or her own biases towards learning strategies, philosophies, likes and dislikes and attempt to describe "what is" rather than "what should be". Materials must be analyzed from the context of their stated or implied purposes rather than what might be achieved or done by a "creative" teacher.

The description completed by the analyst on CEIMA Form M should be detailed enough to ensure that the reader gets a clear mental image of what the material presents, how it is presented, and how successfully it achieves its purposes.

In completing each section of CEIMA Form M, be sure:

1. The report is neat and well written. Remember, you are communicating to others who have not viewed the material.

2. That you include all relevant information requested.

3. That you apply the terminology consistently and in keeping with the definitions as set forth in this guide.

CEIMA Form M is an abbreviated version of the regular CEIMA Analysis Form. It includes all constructs, but restricts data entry in keeping with the needs of certain materials like brochures, pamphlets and audiovisual materials in which limited amounts of content are presented. Whenever numbers of individual components, each having limited content, are correlated to form a series or a kit which as a whole covers a significant amount of content, a regular CEIMA analysis should be completed. CEIMA Form M will be inadequate for these types of materials.

ANALYSIS PROCEDURE

Although you may wish to develop your own system of completing the analysis, the following is a suggested procedure:

1. Make sure you have all the components required on hand.

2. Complete the identification section of the analysis.

3. Read the accompanying guide material and complete as much as possible of the PURPOSE section.

4. Study the material itself.

5. Complete the remaining sections of the analysis using the analysis guide.

6. If necessary, review the material or use it with students.

7. Re-read your analysis, confirming your initial description. Make any changes, additions or deletions to ensure that your analysis is thorough, objective, and accurate.

A GUIDE TO THE ANALYSIS

It is intended that this section of the guide clarify the concepts and terms used in analysis. Terms and concepts are clarified in the same order in which they appear in the analysis form.

I. IDENTIFICATION

This section is intended to record all pertinent identification information by specifying what the product is, from whom it is available and how much it costs.

1.1 Title

Indicate the title of the material exactly as the producer has printed it. Do not use abbreviations unless the producer has done so.

1.2 Series

If the material is part of a series indicate the title of the series. Record the series title exactly as given by the producer

1.3 Copyright Date

Indicate the copyright date specified by the producer. This is usually available in the teacher guide, on the material itself or in the distributor's catalogue. If no copyright date can be located, indicate not available.

1.4 Producer/Distributor

Indicate the producer or distributor of the material as specified in the product or accompanying material.

1.5 Price

Indicate the price of the material as specified in the catalogue, promotional material or teacher guide. If the price is not available leave the space blank.

1.6 Color

Indicate whether the material is in color or black and white.

1.7 Language

Indicate in what language the material is. If the film is non-narrative, indicate non-narrative.

1.8 Time

Indicate the running time of the material.

1.9 Subject Areas

Record stated or implied subject area correlation. If none is stated or implied check Left to User.

1.10 Intended Users

Circle grade levels or range of use and indicate whether stated, or implied, or left to user.

1.11 Components

Separate titles of the parts of the whole product.

Format - The type of material (brochure, 16mm film, slide, filmstrips, audio-tape, etc.)

List all components that make up the material including a teacher guide if one is provided. If the item is a single material and not part of a series, simply record title "as given" and indicate format and length or running time.

STATED: Direct statements in the material or teacher guide which specify the information requested.

IMPLIED: Information which, while not actually stated, can be clearly interpreted from the content and/or presentation of the material.

LEFT TO USER: No clear evidence of interpretation is available.

II. PURPOSE

This section is intended to record what the producer says or implies concerning what the material should accomplish, or what students should be expected to learn as a result of using the material.

(Eg.: "Students will understand the basic principles of electricity").

Indicate whether the purpose of the material is stated or whether it is implied in the guide or material itself. If no purpose is clearly stated or implied, check "left to user". If you check "left to user", do not indicate any purpose in the space provided.

Several goals or purposes may be attributed to a product. Unless the purposes are so numerous that limited space requires summarization, all purposes should be recorded. Remember, all information must be based on what the producer clearly claims or implies.

2.1 Uses

Indicate stated or implied use(s) of the material by placing an "S" (stated) or an "I" (implied) by the appropriate descriptor. If the producer does not specify or imply the type of use, indicate "left to user".

Introduce/Overview - material designed to provide the general relationships between a series of events, principles or ideas as a basis for more detailed study or investigation.

Present Information - material designed to provide facts related to a particular area of study.

Aid Concept Formation - material designed to bring about a comprehension of principles, generalizations, or relationships.

Aid Problem Solving - materials designed to be used in an inductive or deductive approach to learning.

Provide Skills/Drill - materials designed to develop or reinforce learning skills.

Culminating Activity/Review - a material designed to summarize an area of study just completed, or to organize past learning into the desired context of terminal understanding or appreciation.

Build Motivation/Interest - material designed to stimulate an interest in learning more about a particular area of study, stimulating a desire to become involved in some form of personal expression, or creating a level of concern about some problem or issue.

Appreciation - material designed to bring about sufficient understanding to admire critically or to develop a response of approval, enjoyment or gratitude.

Values Clarification - material designed to encourage a critical appraisal of the values and attitudes held by self or others.

3.2 Treatment

Indicate the treatment employed.

Imagery - the use of symbols to stimulate the senses but which have no other representive intent.

Symbolism - the use of images which are intended to represent ideas, emotions, intangibles or some other hidden meaning.

Allegory - the use of people, things or symbols which are representative of some truth or generalization related to human conduct or experience.

Documentary - objective or authoritative documentation of a condition of life or a social or political problem or cause.) Docudrama

Dramatization - the use of actors to present a story or situation.) Docudrama

Natural Phenomenon - natural events as they are occurring or have occurred in the past, Eg.: animal life, volcanic eruption, etc.

Demonstration - the showing of how something operates or is used.

Problem Solving - the use of an inductive or deductive approach to a problem presented.

Direct Teaching - a direct presentation of information or concepts to the viewer.

Non-verbal - accompanying sound without voice, only music or perhaps natural or electronic sounds are used.

Storytelling - approach based on a "story" type of development. The story is the whole or major part of the film.

IV. METHODOLOGY/LEARNING ACTIVITIES

In narrative style, describe the stated or implied directions for use - identify the learning approach, the role of the teacher, role of the student and typical learning activities and learning setting described or suggested. If no suggestions or directions for use are provided, check "left to user". If you check "left to user" do not indicate any methodology or learning activities in the space provided.

Check all appropriate descriptors on the right.

V. TESTS/ASSESSMENT

1. Check appropriate descriptor on the right.

2. Narratively elaborate on any descriptor checked to describe the nature and extent of means provided and purposes served.

VI. OTHER CONSIDERATIONS

NOTE: Checks may indicate either a positive or negative reaction.

Accuracy - errors, ommission.

Bias - Identify any types of bias not included in the context of Tolerance and Understanding Guidelines (E.G.: pro-labor or industrial bias, pro-environmental or pro-development bias, etc.).

Community Acceptance - sensitivity and potential for controversy or opposition on the part of various "publics".
Eg.: industry, labor, parents, teachers, trustees, etc. (violence, sex, politics, religions, learning strategies incorporated, etc.)

Teacher Preparation/Teacher Training - preparation time and effort or the need for a special inservice on the use of the material.

Technical Quality/Packaging - quality of visuals, sound reproduction, dramatic portrayal, technical treatment, attractiveness, durability, ease of handling and storage, safety factors, etc.

After checking appropriate boxes, write a narrative statement covering your praise or concern for each checked item.

VII. CONGRUENCE

The appropriate completion of this section includes the following:

1. An assessment (positive and negative) of the potential of the material to meet its stated or implied purposes. (This can only be done when the developer has clearly set forth the purposes of the material). You should compare the content with goals and objectives - is the scope sufficient, is their enough depth of coverage, is the presentation and treatment appropriate to do the job? Is the suggested methodology appropriate to meet the objectives, and so on.

2. Where the purpose has been "left to the user", give your opinion as to what the material could be used for and what grade/age level. Then rate the material's potential to do a good job.

3. Identify major strengths/weaknesses/concerns regarding the material.

A complete "Congruence" statement will include therefore, #1 or #2 and #3.

III. CONTENT

This section is intended to record the actual content, its organization, and its treatment in the material. The information in this section will describe for the reader "what the material is about", and "how it has been put together".

Content should be described by indicating:

1. The various topics covered (range).
2. The relative depth of coverage of these topics (extent).
3. A brief summary of the way this content is presented.

The items checked on the right hand side will provide a reference as to the information to be included in your summary statement of #3, "how the material is presented".

3.1 Production Technique

Check all descriptors necessary to describe the major production techniques employed in the product.

Photographs - the use of black and white photographs.

Drawings/Paintings - the use of the drawings or paintings (artwork).

Diagrams/Graphs - the use of diagrams, graphs, labeled charts, etc.

Captions/Subtitles - the use of captions or subtitles superimposed or in separate frames.

Animation - the use of animated objects or drawings employing movement.

Live Action - photographing events, actions or phenomena as they occur in front of the camera.

Special Effects - the use of a variety of effects including time lapse, multi-image, montage, color reversals, etc. Indicate what special effect in the content descriptions.

VIII. REVIEW SOURCE

This section is intended to record information about the analyst.

8.1 Analyst Name/Number

8.2 Date

Indicate the date on which you completed the analysis.

8.3 Subject Assignment

Record your present subject area assignment(s).

8.4 Grade

Record the grade level(s) of your present teaching assignment.

(App. III)

CEIMA Form M –
Non-Print Instructional Materials Analysis

IDENTIFICATION

Title:
Series:
Copyright Date:
Producer/Distributor:
Price:
☐ Color ☐ B & W
Language:
Time:

Subject Areas ☐ Stated ☐ Implied ☐ Left to User

Components — Title — Format, Length/Time

Intended Users ☐ Stated ☐ Implied ☐ Left to User

Pre K, K, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12 College, Tchr. Ed., Adult

PURPOSE ☐ Stated ☐ Implied ☐ Left to User

Uses: (Indicate S or I)

- _ Introduce/Overview
- _ Present Information
- _ Aid Concept Formation
- _ Aid Problem Solving
- _ Provide Skills/Drill
- _ Culminating Activity/Review
- _ Build Motivation/Interest
- _ Appreciation
- _ Values Clarification
- _ Other _ _ _ _ _ _
- _ Left to User

CONTENTS (Specify Range, Extent, and how the material is presented)

Production Techniques:

- ☐ Photographs
- ☐ Drawings/Painting
- ☐ Diagrams/Graphs
- ☐ Captions/Subtitles
- ☐ Animation
- ☐ Live Action
- ☐ Special Effects
- ☐ Other _____

Treatment:

- ☐ Inquiry
- ☐ Symbolism
- ☐ Allegory
- ☐ Documentary
- ☐ Dramatization
- ☑ Natural Phenomena
- ☐ Demonstration
- ☐ Problem Solving
- ☑ Direct Teaching
- ☐ Non-Verbal
- ☐ Story Telling
- ☐ Other _____

METHODOLOGY/LEARNING ACTIVITIES ☑ Stated ☐ Implied ☐ Left to User

Has Guide: ☑ Yes ☐ No

Guide Contains:

- ☑ Content Summary
- ☐ Objectives
- ☐ Script
- ☐ Background Information
- ☐ Vocabulary List
- ☐ Discussion Questions
- ☑ Suggested Learning Activities
- ☐ Bibliography
- ☐ Other

Materials Designed for:

- ☐ Self Instruction
- ☐ Teacher Presentation

TESTS/ASSESSMENT ☐ Stated ☐ Implied ☒ Left to User

Material Contains:
- ☐ Suggestions for Teacher
- ☐ Test or Quiz
- ☐ Other

Assesses:
- ☐ Recall
- ☐ Application of Concepts/Principles
- ☐ Skill Performance
- ☐ Attitude/Attitude Change
- ☐ Other

OTHER CONSIDERATIONS

- ☐ Accuracy
- ☐ Bias
- ☐ Currency
- ☐ Community Acceptance
- ☐ Appropriateness of Medium
- ☐ Teacher Prep/Training
- ☒ Technical Quality/Packaging

CONGRUENCE (Refer to Guide)

ADDITIONAL COMMENTS:

Reviewed by: _____
District/School _____
Analyst # _____
Date _____
Subject Assignment _____
Grade _____

app(iv)

GUIDELINES FOR TOLERANCE AND UNDERSTANDING

October 1984

Alberta
EDUCATION

GENERAL CRITERIA

NOTE: Minority groups may refer to different age groups, men or women, various racial or ethnic groups, persons from different religious backgrounds, persons with handicaps, persons of various socio-economic status or of various political beliefs.

A. *DO THE PROGRAM DOCUMENTS AND SUPPORTING MATERIALS CONTAIN EITHER IMPLICIT OR EXPLICIT STATEMENTS, EXAMPLES WHICH PROMOTE TOLERANCE, UNDERSTANDING AND RESPECT FOR INDIVIDUALS AND GROUPS?*

Does the program and its supporting materials and learning resources:

1. present minority groups in a variety of professional or executive roles, vocations, or other gainful occupations?

2. provide a balanced presentation of descriptions or depictions of people from various minorities involved in non-traditional activities?

3. authentically portray minority groups within the setting and period of history presented?

4. contain references to, or illustrations of, minority groups approximately evenly (in both number and importance), except as limited by accuracy or special purpose?

5. present the achievements of minority groups as based on factors apart from their sex, culture, handicap or socio-economic status.

B. *DO THE PROGRAM DOCUMENTS AND SUPPORTING MATERIALS HELP EACH STUDENT TO NURTURE A PERSONAL POSITIVE SELF-IMAGE BY TAKING AN ESSENTIALLY POSITIVE APPROACH TO HUMAN SIMILARITIES AND DIFFERENCES?*

Does the program and its supporting materials and learning resources:

1. present a fair proportion of both minority and majority persons in mentally active, creative and problem-solving roles?

2. present a fair proportion of both minority and majority persons succeeding or failing in various circumstances?

3. limit the depiction of minority groups only to the root culture or are depictions of these groups within the mainstream of Canadian life included?

4. portray minority groups in such a way that members of the groups would approve of the way in which they are portrayed?

5. include examples of minority heroes; and if so, are they admired only for the same qualities that have made majority heroes famous and because what they have done has benefited the majority culture?

C. *DO THE PROGRAM DOCUMENTS AND SUPPORTING MATERIALS CONVEY THAT HUMAN ENDEAVOUR AND ACHIEVEMENT MAY BE FOUND IN DIFFERENT WAYS IN ALL HUMAN GROUPS?*

Does the program and its supporting materials and learning resources:

1. present the achievements and contributions of minority groups to life and culture in Canada or the world?

2. identify, as role models, members of minority groups who are making important contributions to present day society?

3. suggest that minority people can positively influence the society in which they live?

4. accurately depict the contributions made by minority cultures, racial groups and persons with handicaps?

5. suggest that people from various socio-economic and political groups of Canadian society can positively influence the society in which they live?

D. *DO THE PROGRAM DOCUMENTS AND SUPPORTING MATERIALS TAKE ADVANTAGE OF CONTENT AND STRATEGIES THAT CAN ASSIST THE TEACHER IN DEALING POSITIVELY WITH TOLERANCE, UNDERSTANDING AND RESPECT FOR OTHERS?*

Does the program and its supporting materials and learning resources:

1. authentically describe beliefs and customs of minority groups and help students to realize that these beliefs and customs are important and meaningful to the groups who hold them?

2. supply an accurate and sound balance in the matter of historical perspective, making it clear that all racial, political, religious and ethnic groups have mixed heritages, which can well serve as sources of both pride and group humility?

3. promote the understanding that we must accept each other on the basis of individual worth, regardless of sex, or racial, religious, political, or socio-economic background?

4. portray minority groups in society in such a way as to build positive images -- mutual understanding and respect, acceptance, and commitment to ensure equal opportunity for all?

5. include a variety of cultural symbols to which all students can relate?

E. *DO THE PROGRAM DOCUMENTS AND SUPPORTING MATERIALS IMPLICITLY AND EXPLICITLY PROMOTE THE SKILLS OF CRITICAL THINKING AND THEIR APPLICATION IN JUDGING PEOPLE AND THEIR ACTIONS?*

Does the program and its supporting materials and learning resources:

1. assist in motivating students to examine their own values and attitudes towards minority groups?

2. assist students to recognize clearly the basic similarities among all members of the human race, and the uniqueness of every single individual?

3. help students to understand and appreciate that all people build on knowledge across time and across cultures and that the future depends upon our ability to live together in an increasingly interdependent world?

4. go beyond over-simplifications or stereotypes and offer genuine insight into another culture?

5. subject doctrine or propaganda to assessment through the process of critical thinking.

FOCUS STATEMENTS

AGE

The material:

a) present persons of all ages in a range of vocational and avocational pursuits;

b) present the achievements of persons as based on factors in addition to age (i.e., competency, skill, knowledge, etc.);

c) contain references to, or illustrations of persons, in a broad range of ages (approximately evenly in both number and importance) except as limited by accuracy or special purpose;

d) present the impression, through illustrations or suggestion, that health, activity and skill are attributes of all age groups;

e) present middle-aged and older persons in ways that persons of this age group would probably approve.

RACE/ETHNICITY

The materials incorporate race, ethnicity, color and/or nationality in ways that:

a) portray lifestyles, institutions and society so that they reflect the racial and ethnic diversity of Canada;

b) portray racial, ethnic and national groups so as to reflect current knowledge in the social sciences (as opposed to negative myths, stereotypes, patronizing overtones, etc.);

c) represent racial, ethnic and national groups within literature, art, history, etc. in ways which reflect accurately the norms and context of the time period being studied;

d) reflect the positive, creative contribution of racial and ethnic minority groups to Canadian cultural life (e.g., economic, arts, politics, community life).

RELIGION

The materials:

a) present the elements of religious belief and practice (such as spiritualism, belief, creation, worship, deity) in sensitive and respectful ways;

b) present the religious beliefs of minority groups (such as fundamentalist views of creation) in sensitive and respectful ways;

c) present the religious practices of minority groups (such as non-Christian worship and celebrations) in sensitive and respectful ways.

d) present the views of those who profess no religious belief in sensitive and respectful ways.

SEX

The materials:

a) recognize the contributions of both men and women to society;

b) portray men and women in writing and illustration in ways which accurately reflect society at the time being studied;

c) present the writing in a style which acknowledges both sexes without resorting to cumbersome conventions (e.g., his/her);

d) portray decisions made by males and females relative to career choices, roles, etc. in ways which reflect a range of options available in contemporary society.

FUNCTIONALLY DISABLED AND PHYSICALLY IMPAIRED

The materials:

a) depict handicapped persons in ways which do not over-emphasize their differences, and in ways which do not demean or patronize them, either through description or label;

b) present persons with handicaps in a variety of professional or executive roles, vocations, trades or other gainful occupations as well as being recipients of social services;

c) portray authentically those persons with handicaps within the setting and period of history being presented;

d) assist students to recognize the basic similarities and worth among all members of the human race, and the uniqueness of every individual, including those with "differences".

SOCIO-ECONOMIC STATUS

The materials:

a) reflect, through descriptions and illustrations, the broad range of socio-economic levels present in society(ies);

b) depict minority people in the same range of socio-economic settings as are persons of the majority group;

c) present the achievements and contributions of persons from a range of socio-economic levels;

d) depict or describe a range of socio-economic settings, rather than focussing on a single setting or lifestyle as representative or as a societal norm.

POLITICAL BELIEFS

The materials:

a) reflect the existence of many political beliefs in society;

b) present the right of individuals in a democratic society to hold whatever political beliefs they choose provided the rights of others are not infringed upon;

c) in their portrayal of various political groups accurately reflect the society being studied at a given point in time.

Tolerance and Understanding Analysis

Analyst Name/Number _____ Province _____

Date of Analysis _____ 19 ___. Hours spent analyzing _____

Part One

Identification and Background

A. Program/Product Title (exact title, including subtitle and series title if any): _____

B. Authors (name(s) only): _____

_____

C. Publisher/Producer: _____

_____

D. Distributor: _____

E. Titles of all components included in this analysis: _____

_____

_____

_____

_____

F. Summary of Purpose of Material (so that reader can put information which follows into appropriate context): _____

_____

_____

_____

G. Identify any section/chapter of this material that were not analyzed for Tolerance and Understanding and indicate briefly why not: _____

_____

_____

_____

Age References

(Consideration should be given to author's tone, setting, implicit or explicit point of view, and error by omission)

Report the following including references from both text and visuals.

If you quote, quote accurately and give page references.

- Nature and extent of references

Identify:

- groups or individuals portrayed
- role(s) portrayed
- positive and/or negative references
- relationships portrayed with other members of th group and/or other group in society at large
- any generalization/ characterization portrayed
- the context in which the generalization/ characterization is made (historical, present, both of these, none specified)

Sex References (As related to Tolerance & Understanding Issues)

(Consideration should be given to author's tone, setting, implicit or explicit point of view, and error by omission)

Report the following including references from both text and visuals.

If you quote, quote accurately and give page references.

- Nature and extent of references.

Identify:

- groups or individuals portrayed
- role(s) portrayed
- positive and/or negative references
- relationships portrayed with other members of th group and/or other group in society at large
- any generalization/ characterization portrayed
- the context in which the generalization/ characterization is made (historical, present, both of these, none specified)
- stereotyped/non-stereotyped

Section Two - Content Analysis

Race/Ethnicity References

(Consideration should be given to author's tone, setting, implicit or explicit point of view, and error by omission)

Report the following including references from both text and visuals.

If you quote, quote accurately and give page references.

- Nature and extent of references

Identify:

- groups or individuals portrayed
- role(s) portrayed
- positive and/or negative references
- relationships portrayed with other members of th group and/or other group in society at large
- any generalization/ characterization portrayed
- the context in which the generalization/ characterization is made (historical, present, both of these, none specified)

Religion References

(Consideration should be given to author's tone, setting, implicit or explicit point of view, and error by omission)

Report the following including references from both text and visuals.

If you quote, quote accurately and give page references.

- Nature and extent of references.

Identify:

- groups or individuals portrayed
- role(s) portrayed
- positive and/or negative references
- relationships portrayed with other members of th group and/or other group in society at large
- any generalization/ characterization portrayed
- the context in which the generalization/ characterization is made (historical, present, both of these, none specified)

Disabled References

(Consideration should be given to author's tone, setting, implicit or explicit point of view, and error by omission)

Report the following including references from both text and visuals.

If you quote, quote accurately and give page references.

- Nature and extent of references

Identify:

- groups or individuals portrayed
- role(s) portrayed
- positive and/or negative references
- relationships portrayed with other members of th group and/or other group in society at large
- any generalization/ characterization portrayed
- the context in which the generalization/ characterization is made (historical, present, both of these, none specified)

Socio-economic Status References

(Consideration should be given to author's tone, setting, implicit or explicit point of view, and error by omission)

Report the following including references from both text and visuals.

If you quote, quote accurately and give page references.

- Nature and extent of references.

Identify:

- groups or individuals portrayed
- role(s) portrayed
- positive and/or negative references
- relationships portrayed with other members of the group and/or other groups in society at large
- any generalization/ characterization portrayed
- the context in which the generalization/ characterization is made (historical, present, both of these, none specified)

Political Belief References

(Consideration should be given to author's tone, setting, implicit or explicit point of view, and error by omission)

Report the following including references from both text and visuals.

If you quote, quote accurately and give page references.

- Nature and extent of references.

Identify:

- groups or individuals portrayed
- role(s) portrayed
- positive and/or negative references
- relationships portrayed with other members of th group and/or other group in society at large
- any generalization/ characterization portrayed
- the context in which the generalization/ characterization is made (historical, present, both of these, none specified)

Section Three: ANALYST'S SUMMARY

Analyst's Summary: Present an overview of your analysis of the material paying particular attention to those components which represent key concerns or key strengths. Elaborate on each of these by a brief explanation and/or assessment.

TOLERANCE AND UNDERSTANDING EVALUATION FORM App. (VII)

TITLE _____ DATE _____ REVIEWER _____

GENERAL CRITERIA	DESCRIBE THE WAY IN WHICH THE CONCEPTS ARE NET BASED ON GROUP DATA - DOCUMENT STATEMENT	IS CRITERION ADEQUATELY MET?
A. CONTAIN EITHER IMPLICIT OR EXPLICIT GENERALIZATIONS WHICH PROMOTE TOLERANCE, UNDERSTANDING AND RESPECT FOR INDIVIDUALS AND GROUPS.		YES ____ NO ____ N/A* ____
B. HELP STUDENT TO NURTURE A PERSONAL POSITIVE SELF-IMAGE BY TAKING AN ESSENTIALLY POSITIVE APPROACH TO HUMAN SIMILARITIES AND DIFFERENCES.		YES ____ NO ____ N/A* ____
C. CONVEY THAT HUMAN ENDEAVOR AND ACHIEVEMENT MAY BE FOUND IN DIFFERENT WAYS IN ALL HUMAN GROUPS		YES ____ NO ____ N/A* ____
D. TAKE ADVANTAGE OF CONTENT AND STRATEGIES THAT CAN ASSIST THE TEACHER IN DEALING POSITIVELY WITH TOLERANCE, UNDERSTANDING AND RESPECT FOR OTHERS.		YES ____ NO ____ N/A* ____
E. IMPLICITLY AND EXPLICITLY PROMOTE THE SKILLS OF CRITICAL THINKING AND THEIR APPLICATION IN JUDGING PEOPLE AND THEIR ACTIONS.		YES ____ NO ____ N/A* ____

(For Departmental Use)

CATEGORIES FOR JUDGMENT:

1. Acceptable as is
2. Acceptable with minor assistance
3. Problematic
4. Unacceptable

RATING:

1. ____
2. ____
3. ____
4. ____

*N/A: EXPLAIN WHY THE CRITERIA ARE NOT APPLICABLE _____

RECOMMENDED ACTION:

TOLERANCE AND UNDERSTANDING SYNTHESIS FORM (4 pp. (VI)

TYPE OF DOCUMENT:

CURRICULUM DOCUMENT ____ RECOMMENDED RESOURCE ____ NON-PRINT (describe) ____ GRADE LEVELS ____ SUBJECT ____

PRESCRIBED RESOURCE ____ SUPPLEMENTARY RESOURCE ____ PRINT ____ REVIEWER ____

****

BRIEF DESCRIPTION OF MATERIAL BEING AUDITED ____

____

****

CHARACTERISTIC	DOCUMENTING DATA BY EXAMPLE AND PAGE NUMBER	SUMMARIZING COMMENTS
AGE		
SEX		
RACE/ETHNICITY		
RELIGION		
DISABLED		
SOCIO-ECONOMIC STATUS		
POLITICAL BELIEF		

Request for Authorization of Basic Learning Resources

Note: Submit one form per title.

Date: _____

1. Requested by: _____
(Committee/L.R.D./Development Manager)

2. For use in: _____ 3. Grade/level: _____

4. Title/Components (if any) | Publisher/Producer

Title/Components (if any)	Publisher/Producer
Title: _____ Components: a) _____ b) _____ c) _____ d) _____	

5. Rationale:

This material is needed:

	Yes	No
5.1 In addition to existing Basic learning resources		
5.2 To replace a previously authorized Basic learning resouce		
5.3 To serve as a Basic learning resource where none existed before		

6. Other Considerations:

The publisher/producer has agreed to:

	Yes	No
6.1 Make all components available for at least 3 years		
6.2 Permit reformatting to serve hearing and visuall impaired		
6.3 Publish or allow Alberta Education to publish translated versions		

7. Endorsement: The undersigned endorses that all approved procedures and standards have been applied in the selection of this learning resource and its components.

_____
Development Manager

_____ Approved
_____ Not Approved

_____ Approved
_____ Not Approved

_____
Development Branch Director

_____
Deputy Minister

Request for Authorization of Recommended Learning Resources

Note: Submit one form per title.

Date: _____

1. Requested by: _____
(Committee/L.R.O./Development Manager)

2. For use in: _____ 3. Grade/level: _____
(Subject Area/Program)

4. Title/Components (if any) | Publisher/Producer

Title/Components (if any)	Publisher/Producer
Title: _____ Components: a) _____ b) _____ c) _____ d) _____	

5. Rationale:

This material is needed:

	Yes	No
5.1 In addition to existing Recommended learning resources		
5.2 To replace one or more existing Recommended learning resources		
5.3 To serve as a Recommended learning resource where no existed before		

6. Endorsement: The undersigned endorses that all approved procedures and standards have been applied in the selection of this learning resource.

_____
Development Manager

_____ Approved

_____ Not Approved

_____
Development Branch Director

Request for a Change in Status of a Basic Learning Resource

Note: Submit one form per title.

Date: _____

1. Description of learning resource to be redesignated.

   1.1 Title: _____

   1.2 Publisher/Producer: _____

   1.3 Components (if any): _____

   _____

   _____

2. Proposed redesignation status: _____

3. Endorsement: The undersigned endorses that all approved standards and procedures have been applied in the review of this learning resource, and that all pertinent documentation is attached to support the recommended change in status (as per Section II, 3, page 13, Policy, Guidelines, and Procedures for the Selection and Classification of Provincially Authorized Learning Resources).

_____
Development Manager

_____ Approved
_____ Not Approved

_____
Development Branch Director

_____ Approved
_____ Not Approved

_____
Deputy Minister

Request for a Change in Status of a Recommended Learning Resource

Note: Submit one form per title.

Date: _____

1. Description of learning resource to be redesignated.

   1.1 Title: _____

   1.2 Publisher/Producer: _____

   1.3 Components (if any): _____

   _____

   _____

2. Proposed redesignation status: _____

3. Endorsement: The undersigned endorses that all approved standards and procedures have been applied in the review of this learning resource, and that all pertinent documentation is attached to support the recommended change in status (as per Section II, 3, page 13, Policy, Guidelines, and Procedures for the Selection and Classification of Provincially Authorized Learning Resources).

_____
Development Manager

_____ Approved
_____ Not Approved

_____
Development Branch Director

_____ Approved
_____ Not Approved

_____
Deputy Minister

ALBERTA EDUCATION

DISCARD POLICY

May 1, 1982

Information available from:

Library Services,
Central Library
427-2985

DISCARD POLICIES

Over the past year an Ad Hoc committee of the InterBranch Library Committee has been working on a policy to cover the discard of materials from department libraries and resource centres.

The recommendations have been approved and are set out below, along with some procedures.

I. FREE CURRICULUM MATERIALS RECEIVED FOR EVALUATION PURPOSES.

Recommendation that:

Free textbooks and materials received from publishers and/or distributors for evaluation purposes, that have been rejected by curriculum committees, shall be returned to the publisher or distributor.

Procedures:

1. Publishers and/or distributors will be notified that rejected materials are being returned, and reasons for rejection will be identified.

2. A copy of the rejection notice will be kept on file in the appropriate branch.

3. Rejected materials will be returned by the appropriate branch, or on behalf of a branch by the Curriculum and Professional Resources Unit of the Central Library.

Directors' Council approval received February 8, 1982.

II. FREE AND PURCHASED FRENCH AND UKRAINIAN MATERIALS.

Recommendation that:

Free and purchased materials in French and/or Ukrainian, obtained for evaluation purposes continue to be discarded by a process worked out by the Language Services Branch over several years, in which most French materials are sent to the Centre Pedagogique, Faculte Saint-Jean, and most Ukrainian materials are sent to the Canadian Institute of Ukrainian Studies, Resource Centre.

Deputy Minister's approval dated April 23, 1982.

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III. PURCHASED MATERIALS FOR EVALUATION PURPOSES.

Recommendation that:

Those materials that have been purchased for evaluation purposes and have been rejected because of gross inaccuracies, or objectionable or discriminatory content, be sent for shredding; those materials that have been purchased for evaluation purposes that have been rejected for other reasons, be offered to any of the following: Alberta Government department libraries, appropriate pedagogical or post-secondary institute, other agencies such as the Overseas Book Centre.

Deputy Minister's Approval dated April 23, 1982.

Procedures:

1. Learning Resource Officers shall notify the publishers or agents of the reasons for rejection, and maintain the records for these decisions.

2. Learning Resource Officers shall be responsible for the decision to shred items, and to designate choice of disposal.

3. Under the direction of the L.R.O., branch support staff, or Central Library support staff (Curriculum and Professional Resources Unit) will notify one or more of the following of the availability of the material, and allow sixty (60) days for an acceptance, after which the material will be shipped or delivered as necessary.

   a) If a designated disposal site is in a correctional institute, contact the librarian in the Solicitor General's Department before shipping.

   b) If a designated disposal site is a public library, contact the librarian in charge of Public Library Services, Alberta Culture, before shipping.

   c) If a designated disposal site is a school or post-secondary institution contact the institution before shipping.

   d) If the designated site is outside Canada, contact the Overseas Book Centre to determine if there is a demand for the type of material being discarded.

   e) After sixty (60) days, the items which cannot be distributed will be shredded/recycled.

IV. CURRICULUM MATERIALS IN DEPARTMENT LIBRARIES.

Recommendation that:

Curriculum Materials in Alberta Education department libraries that have been weeded be discarded by offering the material to other Alberta government department libraries; appropriate pedagogical or post-secondary institutions;

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other agencies such as the Overseas Book Centre, or sent for shredding if the information is no longer correct, the item is worn, or no other location will accept it as a donation.

Deputy Minister's Approval dated April 23, 1982.

Procedures:

1. Weeding should be done by subject specialist consultants, teachers, or qualified library staff.

2. Records must show removal from the collection or relocation within the department.

3. Each item should have the work "Discard" stamped over the location stamp.

4. Staff from the specific library will handl discarding procedures for their own collections.

5. Materials weeded from the Material Resource Centres (for the Visually Impaired) may be shipped to Resource Centres for the Visually Impaired in other provinces if copyright permission can be obtained to allow the transfer.

6. Items sent to archives collections become the property of the receiving institution.

V. PROFESSIONAL MATERIALS IN DEPARTMENT LIBRARIES.

Recommendation that:

The professional materials, weeded from the library collections be offered to any of the following: Alberta government department libraries, appropriate pedagogical or post-secondary institutions, other agencies such as the Overseas Book Centre, or sent for shredding if the information is no longer correct, the item is worn, or no other location will accept it as a donation.

Deputy Minister's Approval dated April 23, 1982.

Procedures:

1. Librarians, library technicians, or personnel in charge of collections are to sanction the weeding of these items in conjunction with the appropriate original requestor, learning resource officer, or subject specialist consultants, etc., if necessary.

2. Records must show removal from the collection or relocation within the department.

3. Each item should have the word "DISCARD" stamped over the location stamp.

4. Staff from the specific library will handle discarding procedures for their own collection.